



TIBCO Flogo® Connector for Zoho CRM User's Guide

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TIBCO Documentation and Support Services

How to Access TIBCO Documentation

Documentation for TIBCO products is available on the TIBCO Product Documentation website, mainly in HTML and PDF formats.

The TIBCO Product Documentation website is updated frequently and is more current than any other documentation included with the product. To access the latest documentation, visit <https://docs.tibco.com>.

Documentation for TIBCO Flogo[®] Connector for Zoho CRM is available on the TIBCO Flogo[®] Connector for Zoho CRM Product Documentation page.

Product-Specific Documentation

The following documents for this product can be found on the TIBCO Documentation site:

- *TIBCO Flogo[®] Connector for Zoho CRM Installation*
- *TIBCO Flogo[®] Connector for Zoho CRM User's Guide*
- *TIBCO Flogo[®] Connector for Zoho CRM Release Notes*

How to Contact TIBCO Support

You can contact TIBCO Support in the following ways:

- For an overview of TIBCO Support, visit <http://www.tibco.com/services/support>.
- For accessing the Support Knowledge Base and getting personalized content about products you are interested in, visit the TIBCO Support portal at <https://support.tibco.com>.
- For creating a Support case, you must have a valid maintenance or support contract with TIBCO. You also need a user name and password to log in to <https://support.tibco.com>. If you do not have a user name, you can request one by clicking Register on the website.

How to Join TIBCO Community

TIBCO Community is the official channel for TIBCO customers, partners, and employee subject matter experts to share and access their collective experience. TIBCO Community offers access to Q&A forums, product wikis, and best practices. It also offers access to extensions, adapters, solution accelerators, and tools that extend and enable customers to gain full value from TIBCO products. In addition, users can submit and vote on feature requests from within the [TIBCO Ideas Portal](https://community.tibco.com). For a free registration, go to <https://community.tibco.com>.

Overview

Zoho CRM is a customer relationship management (CRM) software that helps you streamline sales, marketing, customer support, and inventory management functions for your organization. You can use TIBCO Flogo[®] Connector for Zoho CRM to perform operations such as create, delete, update, and search on the Zoho CRM instance.

Creating a Zoho CRM Connection

You must create a Zoho CRM connection before you can use the TIBCO Flogo® Connector for Zoho CRM. The Zoho CRM connection contains the parameters required to connect to the Zoho CRM server. The Zoho CRM connection is used by all the activities in the Zoho CRM category. Use the following procedure to create a connection:

Prerequisites

Familiarize yourself with Zoho CRM before you use this connector. For more information about how to use the Zoho CRM product, see [Zoho CRM documentation](#).

In the Zoho Developer Console, add client details and set **Authorized Redirect URI**. For example, to redirect to TIBCO Flogo® Enterprise, the Authorized Redirect URI can be <http://localhost:8090/wistudio/connectiondetails>

Procedure

1. In Flogo® Enterprise, click the **Connections** tab and perform one of the following actions:
 - To add a connection for the first time, click the **Zoho CRM Connector** card.

You can search for a connector by typing the connector name in the **search** field.
 - If you have existing connections and want to add a new connection, click the **Add Connection** link and select the **Zoho CRM Connector** tile.
2. In the Zoho CRM Connector dialog box, enter the connection details. For field descriptions, see [Zoho CRM Connection Details](#).
3. Click **Save Connection**.

Zoho CRM Connection Details

The Zoho CRM Connector dialog box contains the following fields:

Field	Description
Connection Name	The unique name for the connection you are creating. The name is displayed as a list option in the Connection list for all the TIBCO Flogo® Connector for Zoho CRM activities.
Description	A short description of connection.
Domain	Select one of the following domains in which you have an account: <ul style="list-style-type: none"> • India • Europe • US • China
Client ID	The Client ID is a part of the OAuth 2.0 token configuration. For more information, see the "Initiate an Integration with OAuth 2.0" section in Zoho CRM API documentation .

Field	Description
Client Secret	The Client Secret is a part of the OAuth 2.0 token configuration. For more information, see the "Initiate an Integration with OAuth 2.0" section in Zoho CRM API documentation .

Zoho CRM Create

The **Zoho CRM Create** activity adds an object to the database of your organization.

Configuration

On the **Configuration** tab, you can define the Zoho CRM connection and the type of object to be created.

Field	Description
Connection	Select the connection you want to use from the list.
Object	<div> Select one of the following objects you want to create from the list: <ul style="list-style-type: none"> accounts campaigns cases contacts leads </div>

Input

The input tree displayed for this activity depends on the object that you have selected on the **Configuration** tab. You have the option to enter the input manually. If the preceding activity has an output, you can map the input to the output from the preceding activity.

Output

The **Output** tab displays the output schema of the activity in a tree structure format. The output is read-only. The information in the schema varies based on the fields selected on the **Configuration** tab. The properties that are displayed in the schema correspond to the output of this activity and can be used as input by subsequent activities in the flow.

Iterator

Use the **Iterator** tab to iterate a certain piece of logic multiple times. If you leave this tab blank, the activity is executed only once.


For more information about Iterator, see "Using the Iterator in an Activity" in the TIBCO Flogo® apps documentation.

Zoho CRM Query

The **Zoho CRM Query** activity runs the query for the specified object and returns the data that matches the criteria in the query.

Configuration

On the **Configuration** tab, you can define the Zoho CRM connection and the type of object to be deleted.

Field	Description
Connection	Select the connection you want to use from the list.
Object	Select one of the following objects you want to create from the list: <ul style="list-style-type: none"> • accounts • campaigns • cases • contacts • leads
Action	Select one of the options from the list. <div>  <div> The options in this list varies depending on the type of activity and the object you select. </div> </div>

Input

The input tree displayed for this activity depends on the object that you have selected on the **Configuration** tab. You have the option to enter the input manually. If the preceding activity has an output, you can map the input to the output from the preceding activity.

Output

The **Output** tab displays the output schema of the activity in a tree structure format. The output is read-only. The information in the schema varies based on the fields selected on the **Configuration** tab. The properties that are displayed in the schema correspond to the output of this activity and can be used as input by subsequent activities in the flow.

Iterator

Use the **Iterator** tab to iterate a certain piece of logic multiple times. If you leave this tab blank, the activity is executed only once.

For more information about Iterator, see "Using the Iterator in an Activity" in the TIBCO Flogo® apps documentation.

Zoho CRM Update

The **Zoho CRM Update** activity is used to update a record in the Zoho database. It updates a record of the specified object from the database of your organization.

Configuration

On the **Configuration** tab, you can define the Zoho CRM connection and the type of object to be created.

Field	Description
Connection	Select the connection you want to use from the list.
Object	Select one of the following objects you want to create from the list: <ul style="list-style-type: none"> • accounts • campaigns • cases • contacts • leads

Input

The input tree displayed for this activity depends on the object that you have selected on the **Configuration** tab. You have the option to enter the input manually. If the preceding activity has an output, you can map the input to the output from the preceding activity.

Output

The **Output** tab displays the output schema of the activity in a tree structure format. The output is read-only. The information in the schema varies based on the fields selected on the **Configuration** tab. The properties that are displayed in the schema correspond to the output of this activity and can be used as input by subsequent activities in the flow.

Iterator

Use the **Iterator** tab to iterate a certain piece of logic multiple times. If you leave this tab blank, the activity is executed only once.

For more information about Iterator, see "Using the Iterator in an Activity" in the TIBCO Flogo® apps documentation.

Zoho CRM Delete

The **Zoho CRM Delete** activity is used to delete a record in the Zoho CRM database. It deletes a record of the specified object from the database of your organization.

Configuration

On the **Configuration** tab, you can define the Zoho CRM connection and the type of object to be deleted.

Field	Description
Connection	Select the connection you want to use from the list.
Object	Select one of the following objects you want to create from the list: <ul style="list-style-type: none"> • accounts • campaigns • cases • contacts • leads

Input

The input tree displayed for this activity depends on the object that you have selected on the **Configuration** tab. You have the option to enter the input manually. If the preceding activity has an output, you can map the input to the output from the preceding activity.

Output

The **Output** tab displays the output schema of the activity in a tree structure format. The output is read-only. The information in the schema varies based on the fields selected on the **Configuration** tab. The properties that are displayed in the schema correspond to the output of this activity and can be used as input by subsequent activities in the flow.

Iterator

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